

**Extended Leave Processing Overview**

Some types of extended absences require different entry, processing, and approval. These include Family Medical Leave (FMLA), Short Term Disability (STD), Long Term Disability (LTD), and Workers' Compensation Leave (WCL).

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## Family Medical Leave (FMLA)

### Eligibility

An employee's eligibility for FMLA is initially determined by Human Resources. Once Human Resources approves an employee's FMLA leave (outside of Cardinal), the Administrator enters a balance adjustment in Cardinal. A **Self Service** user cannot submit an FMLA absence until the Administrator enters a balance.

### Event Entry

Determine whether the FMLA event is intermittent or consecutive:

- If the FMLA is intermittent:
  - The employee or manager can enter FMLA takes in **Self Service**.
  - An Administrator can enter FMLA on behalf of the employee as well.
  - Forecasting is required.
  - The employee cannot submit requests for more hours than are available in the balance.
- If the FMLA is consecutive:
  - Only the Administrator can enter the FMLA take on the **Absence Event** page.
  - The employee, manager, and Timekeeper can enter FMLA in **Self Service** on the timesheet.

Another leave take must be entered equal to the FMLA entered, such as **SCK** (Sick), **VAC** (Vacation), or even **LNP** (Leave Not Paid) or **STL** (Short Term Disability - LWOP) to indicate unpaid hours. Those takes can be entered with overlapping begin and end dates as needed.

If FMLA is used concurrently with **CPT** (Compensatory Time Taken) or **OTT** (Overtime Taken), the Self Service user, Timekeeper, or Manager enters the **CPT** and **OTT** takes on the timesheet (top grid). **CPT** and **OTT** are not available on the **Absence Event** section. **CPT** and **OTT** must be entered on the timesheet to update the **CPT** and **OTT** balances in Time & Labor.

Always enter a **Reason Code** for the FMLA event. The three options are:

- FMLA Employee
- FMLA Family
- FMLA Military

FMLA absence events entered by the Administrator do not automatically display as **Approved**. All FMLA events must be approved by a second Administrator. To approve the FMLA absence event, the second Administrator searches for the employee on **Absence Event**, clicks the **Details** tab for the **FMLA** event, checks the **Manager Approved** box, clicks the **OK** button, and then clicks the **Save** button. The workflow status then changes to **Approved**.

#### Accumulators and Payee Messages

The following accumulators track FMLA usage and related payee messages that generate as warnings when certain accumulator limits are reached:

- **FMLA EMP/FAM BAL:** Includes all FMLA events with a reason of Employee or Family used in the leave year. A payee message generates when the current FMLA reason used is **Employee** or **Family**, and this accumulator either exceeds 480 hours in the leave year or exceeds the prorated amount for PT employees based on % of fulltime employment.
- **FMLA MILITARY BAL:** Includes all FMLA events with a reason of Military or no reason used in the past rolling 12 months. A payee message generates when the current FMLA reason used is **Military** and this accumulator exceeds 26 weeks (1040 hours) in the leave year or exceeds the prorated amount for PT employees based on % of full-time employment. This accumulator automatically zeroes out at the beginning of the new leave year unless a consecutive FMLA event crosses over into the new leave year. For intermittent FMLA, the Administrator must manually adjust the tracking accumulator as part of the new leave year recertification process if the balance should continue to accumulate.
- **FMLA ROLLOVER BAL:** Includes all FMLA events used in the past rolling 12 months regardless of reason.
- **SCK FMLA TAKE BAL:** Includes all SCK events taken since a consecutive FMLA event began. A payee message generates when the employee exceeds 33% usage of the available SCK balance (based on the balance available on the date FMLA event began).
- **SDP FMLA TAKE BAL:** Includes all SDP events taken since a consecutive FMLA event began (a period where FMLA is used every day, not intermittent/occasional usage of FMLA). A payee message generates when the employee exceeds 33% usage of the available SDP balance (based on the balance available on the date FMLA event began).



## Time & Attendance Job Aid

### 501 TA366: Extended Leave Processing

To access the **Payee Messages** by **Calendar Group**, use the following path:

**Cardinal FIN > Cardinal HCM > Main Menu > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Payee Messages**

Navigation: Favorites > Main Menu > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Payee Messages

### Payee Messages

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Calendar Group ID begins with

Search Clear Basic Search Save Search Criteria

### Search Results

View All First 1-35 of 35 Last

Calendar Group ID	Description
SMLV201615	SMLV Cal Group 15 2016
SMLV201616	SMLV Cal Group 16 2016
SMLV201617	SMLV Cal Group 17 2016
SMLV201618	SMLV Cal Group 18 2016
SMLV201619	SMLV Cal Group 19 2016
SMLV201620	SMLV Cal Group 20 2016
SMLV201621	SMLV Cal Group 21 2016
SMLV201622	SMLV Cal Group 22 2016
SMLV201623	SMLV Cal Group 23 2016
SMLV201624	SMLV Cal Group 24 2016
SMLV201700	SMLV Cal Group 00 2017
SMLV201701	SMLV Cal Group 01 2017
SMLV201702	SMLV Cal Group 02 2017
SMLV201703	SMLV Cal Group 03 2017
SMLV201704	SMLV Cal Group 04 2017

1. Click the **Search** button to see a list of available **Calendar Group IDs**.
2. Select the **Calendar ID** you want to view and click it.

Payee Messages

Calendar Group ID SMLV201615 SMLV Cal Group 15 2016 Country USA

**Selection Criteria**

Empl ID From  Empl ID To

Pay Group  Calendar ID

Group List ID  Calculation Status

Message Set  Message Number

Message Severity

**Select Matching Messages** Clear Go To Print Report

**Messages** Personalize | Find | View All | First 1 of 1 Last

Empl ID	Name	Record	Calc Status	Message	Set	Number	Severity	
		0						Details

Return to Search Previous in List Next in List Notify

- Enter specific **Selection Criteria** to limit the results, or click the **Select Matching Messages** button without entering search criteria to retrieve all payee messages. For this scenario the **Select Matching Message** button is clicked.

Payee Messages

Calendar Group ID SMLV201615 SMLV Cal Group 15 2016 Country USA

**Selection Criteria**

Empl ID From  Empl ID To

Pay Group  Calendar ID

Group List ID  Calculation Status

Message Set  Message Number

Message Severity

**Select Matching Messages** Clear Go To Print Report

**Messages** Personalize | Find | View 100 | First 1-2 of 234 Last

Empl ID	Name	Record	Calc Status	Message	Set	Number	Severity	
00007554100	JOHN DOE		0 Calculation Successful	Employee Exceeds FMLA Leave Year Limit of 480 Hours. Pay Period End Date: 2016-08-24	25102	2001	Warning	Details
00010415200	JOHN DOE		0 Calculation Successful	Employee Exceeds SDP Usage Limit of 33% During FMLA.	25102	2005	Warning	Details

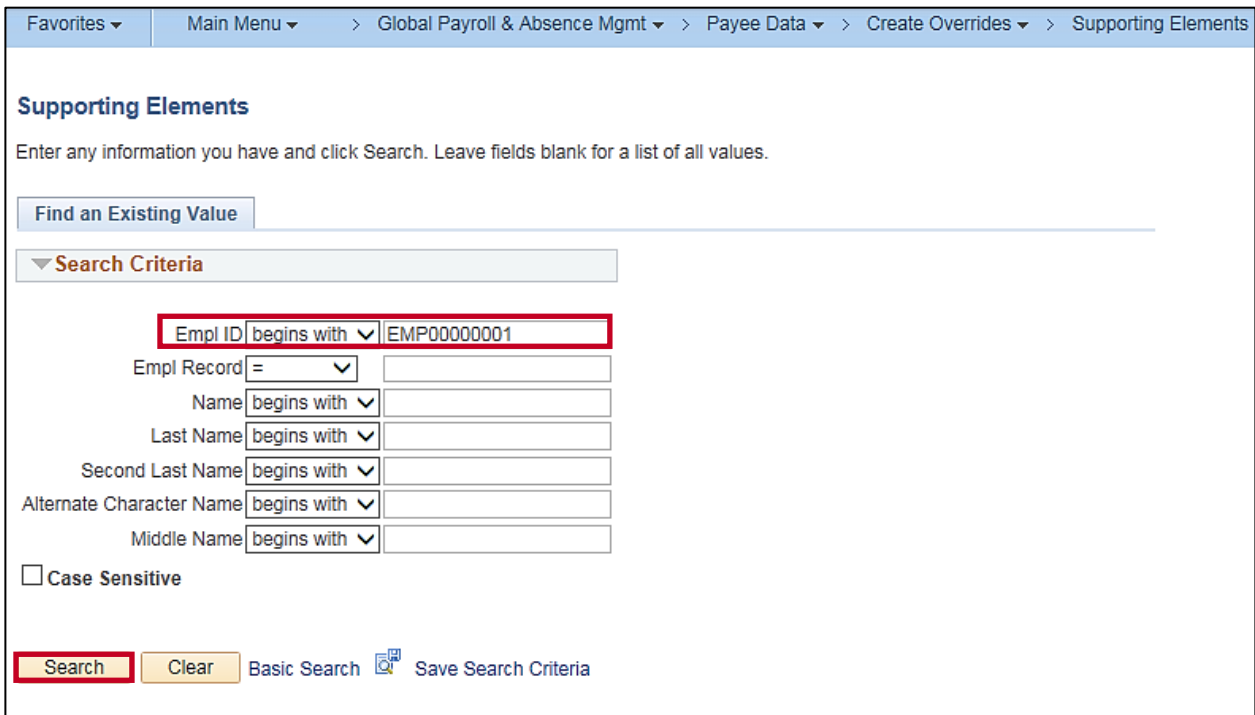
Return to Search Previous in List Next in List Notify

- The **Message** tab displays **Empl ID**, **Name**, **Record**, **Calendar ID**, **Pay Group**, and **Segment**.

To adjust an FMLA tracking accumulator, enter a variable override to adjust the current accumulator value.

1. Navigate to the **Supporting Elements** page using the following path:

**Cardinal FIN > Cardinal HCM > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Create Overrides > Supporting Elements**



Supporting Elements

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID begins with ▼ EMP00000001

Empl Record = ▼

Name begins with ▼

Last Name begins with ▼

Second Last Name begins with ▼

Alternate Character Name begins with ▼

Middle Name begins with ▼

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

2. Enter the **Empl ID** or other **Search Criteria**.
3. Click the **Search** button.

Favorites ▾ | Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Create Overrides ▾ > Supporting Elements

### Supporting Elements

Employee ID EMP00000001      Empl Record 0      Name LOUISA ALCOTT

**Payee Supporting Element Override List**      Personalize | Find | View All | [Grid Icon] | [Print Icon]      First ◀ 1-2 of 2 ▶ Last

Elements/Dates Values [Add Icon]

Element Type	Element Name	Description	*Begin Date	End Date	
Variable ▾	V SCK FMLA TAKE BA	V SCK FMLA TAKE BA	12/05/2016 [Calendar Icon]	12/30/2016 [Calendar Icon]	[+ -]
Variable ▾	V SDP FMLA TAKE BA	V SDP FMLA TAKE BA	01/16/2017 [Calendar Icon]	01/20/2017 [Calendar Icon]	[+ -]

[Save] [Return to Search] [Notify]

4. Click the plus (+) sign to add a row.
5. Enter the **Element Type: Variable**.
6. Select the **Element Name**, which is as the accumulator name with a **V** in front (example, to adjust the FMLA ROLLOVER BAL, select the **V FMLA ROLLOVER BA** variable):
  - a. **V FMLA EMP/FAM BAL**
  - b. **V FMLA MILITARY BA**
  - c. **V FMLA ROLLOVER BA**
  - d. **V SCK FMLA TAKE BA**
  - e. **V SDP FMLA TAKE BA**
7. Enter the **Begin Date**: pay period begin date you want the adjustment to occur.
8. Enter the **End Date**: pay period end date you want the adjustment to occur.
9. Click the **Values** tab.

Favorites ▾ | Main Menu ▾ | > Global Payroll & Absence Mgmt ▾ | > Payee Data ▾ | > Create Overrides ▾ | > Supporting Elements

### Supporting Elements

Employee ID EMP00000001 | Empl Record 0 | Name LOUISA ALCOTT

**Payee Supporting Element Override List** | Personalize | Find | View All | [Grid Icon] | [Print Icon] | First | 1-2 of 2 | Last

Elements/Dates | **Values** | [Filter Icon]

Element Type	Element Name	Numeric Value		
Variable ▾	V SCK FMLA TAKE BA	120.000000	[Calendar Icon]	[+] [-]
Variable ▾	V SDP FMLA TAKE BA	40.000000	[Calendar Icon]	[+] [-]

[Save] [Return to Search] [Notify]

10. Enter the positive or negative amount of the adjustment.
11. Click the **Save** button.

The next time the **Absence Calc** process runs, the adjustment will be made to the accumulator. If your adjustment is for a future period, it will be made when the **Absence Calc** process is run for the future period).

### Accruals

Other leave types that accrue per pay period or annually continue to accrue while the employee is on FMLA, unless FMLA is used concurrently with another leave type that does not allow accrual (i.e., **LNP**, **DLR**).



## Short Term Disability (STD)

### Eligibility

Short Term Disability (STD) can be selected for any employee in the VSDP eligibility group. STD is not an available take in **Self Service**; only an Administrator can enter STD for an employee. Beginning balances do not need to be granted prior to using the STD take.

### Event Entry

Enter the STD take based on the STD coverage percent:

- If the STD covers 100% of pay, leave the partial hours blank.
- If the STD covers 80% of pay, enter 80% of the scheduled hours as partial hours.
- If the STD covers 60% of pay, enter 60% of the scheduled hours as partial hours.

If STD does not cover 100% of pay, you can enter any other take except **SDP** to supplement scheduled hours not covered:

- Vacation can be entered for the remaining 20% or 40%.
- **DSK** (Disability Credit) can be entered for the remaining 20% or 40%. State policy requires that **DSK** be used in 8 hour increments. So if **DSK** is used in conjunction with STD, 8 hours per day is deducted from the **DSK** balance, regardless of the number of hours you actually enter for each day. For example, if you enter 6.4 **STD** and 1.6 **DSK** hours, then 8 **DSK** hours are deducted from the **DSK** balance but only 1.6 hours are **DSK** earnings.
- Enter the actual number of **DSK** hours that need to be used or substituted. Make sure the total number of absence hours entered for the day does not exceed scheduled hours. This ensures accurate allocation of payroll.
- **CPT** or **OTT** takes can be used for hours not covered by STD. Enter them on the timesheet (top grid). **CPT** and **OTT** are not available on the **Absence Event** page. **CPT** and **OTT** must be entered on the timesheet in order to update the **CPT** and **OTT** balances in Time & Labor.
- **STL** should be used for the unpaid time (instead of **LNP**) if the employee does not have sufficient balances of other leave types to cover the difference or chooses not to use paid leave.
- While an employee is on STD, the holiday schedule on the employee's Job Data record should be updated to the STD holiday schedule. The STD holiday schedule has no holidays, which allows for STD and other absence types used in conjunction with STD to be processed on a holiday. To update an employee's holiday schedule, add an effective dated row on the Job Data record when the employee goes out on STD leave and again when the employee returns from STD leave.
- Time Reporting Code (TRC) **RSW** (Short Term Disability Working) should be used for tracking purposes (instead of **RGS**) for regular productive hours if the employee is also working while on STD.

Like FML, LTD, and WCL, STD absence events are not auto-approved when entered by the Administrator. They must be approved by a second Administrator. To approve an STD absence event, the second Administrator must:

- Search for **STD** on the **Absence Event** page.
- Click the **Details** tab for the STD event.
- Check the **Manager Approved** box.
- Click the **OK** button.
- Click the **Save** button.

The workflow status then changes to **Approved**.

### **Accumulators and Payee Messages**

The following accumulators track STD usage and related payee messages that generate as warnings when certain accumulator limits are reached.

- **STD TAKE BAL DAYS:** Includes all STD events used in the leave year in days rather than hours (regardless of the number of partial hours entered each day) and includes paid holidays but does not include weekends. A payee message generates if the employee exceeds 125 days in the leave year. This accumulator automatically zeroes out at the beginning of the new leave year unless a consecutive FMLA event crosses over into the new leave year. For intermittent FMLA, the Administrator manually adjusts the tracking accumulator as part of the new leave year recertification process if the balance should continue to accumulate.
- **STD VAC ACR LMT AC:** Counts consecutive days of STD (regardless of the number of partial hours entered each day) and includes paid holidays and weekends. The accumulator only includes usage of the STD leave type and not other leave types that may be used as part of the STD waiting period. This accumulator automatically zeroes out at the beginning of the new leave year unless a consecutive FMLA event crosses over into the new leave year. For intermittent FMLA, the Administrator manually adjusts the tracking accumulator as part of the new leave year recertification process if the balance should continue to accumulate.

To adjust an STD tracking accumulator, make a variable override and adjust the current accumulator. The Element Name is the same name as the accumulator with a **V** in front:

- **V STD TAKE BAL DAY**
- **V STD VAC ACR LMT**

**Note:** This process is different from the process to adjust a balance accumulator.

**Accruals**

The vacation accrual formula does not accrue the vacation entitlement in periods where the employee has been on STD for 90+ consecutive calendar days, as determined by the absence of any regular TRCs in the preceding 90 day period. In order for the employee to continue accruing vacation within the first 90 days of STD, the **STL** take should be used for any leave without pay instead of the **LNP** take. The employee will accrue vacation once they have returned to work for a full pay period. The employee will accrue if they have used any regular hours in the past 90 days.

If an employee is on STD (80% or 60%) for more than 90 consecutive days and is also working 20+ hours per week to supplement the uncovered hours (**RSW**), the vacation accrual formula will accrue. If accruals were previously stopped and the employee returns part-time, they will accrue in the period of return provided they return on the first scheduled work day of the period.

The VSDP sick and VSDP personal entitlements do not accrue on January 10, at the beginning of the leave year, if the employee has used STD in the 24<sup>th</sup> pay period of the previous leave year and has not also keyed any regular hours (RGS, RSW, RLW) in that same period. If an employee returns from STD leave and did not accrue VSDP sick and VSDP personal on January 10, the Administrator must enter balance adjustments to grant the entitlements upon return.

## Long Term Disability (LTD)

### Eligibility

Long Term Disability (LTD) can be selected for any employee in the VSDP eligibility group. LTD is not an available take in **Self Service**; only an Administrator can enter LTD for an employee. Beginning balances do not need to be granted prior to using the **LTD** take.

### Entry

The **LTD** take can be entered with any other take on the same day in order to substitute scheduled hours not covered by LTD.

If **CPT** or **OTT** takes are used to substitute hours not covered by LTD, the **CPT** and **OTT** takes should be entered on the timesheet (top grid) because they are not available on the **Absence Event** page. The entry of **CPT** and **OTT** must occur on the timesheet in order to update the CPT and OTT balances in Time & Labor.

Regular productive hours worked while the employee is on LTD are entered on the timesheet using the TRC **RLW** (Long Term Disability Working) rather than **RGS** for tracking purposes. (The employee is required to work a minimum of 20 hours per week while on LTD in order to remain an active employee.)

LTD absence events are not auto-approved by the Administrator. All LTD events must be approved by a second Administrator. To approve an LTD event, the second Administrator must:

- Search for the employee on **Absence Event**
- Click the **Details** tab for the LTD event.
- Check the **Manager Approved** box.
- Click the **OK** button.
- Click the **Save** button.
- The workflow status changes to **Approved**.

The Standard Hours on the employee's position and job record must be updated to reflect the number of hours the employee is working while on LTD. To update an employee's position and job record, add an effective dated row on the **Position Data** record when the employee goes on LTD leave and again when the employee returns from LTD leave, and check to make sure the Job Data record is updated online with the same effective dates.

Do not change the employee's schedule. The employee is still expected to fulfill the scheduled hours with a combination of RLW, LTD or other productive and non-productive TRCs as appropriate.

**Accruals**

The vacation accrual formula continues to accrue vacation for employees on LTD. The hours granted will be prorated based on the percentage of standard hours/week the employee is working (as indicated on the employee's Job record) and based on years of service. For example, an employee who normally accrues 8 VAC hours per pay period and is working 20 hours per week while on LTD will accrue 4 VAC hours.

The VSDP sick and VSDP personal entitlements do not accrue on January 10 at the beginning of the leave year if the employee has used LTD in the 24<sup>th</sup> pay period of the previous leave year and has not also keyed any regular hours (RGS, RSW, RLW) in that same period. If an employee returns from LTD leave and did not accrue VSDP sick and VSDP personal on January 10, the Administrator must enter balance adjustments to grant the entitlements upon return.

Holiday hours are prorated based on the percentage of standard hours/week the employee is working during periods of LTD (as indicated on the employee's Job record). For example, an employee who is working 20 hours per week while on LTD will be granted 4 HOL hours for a regular 8-hour holiday.

## Workers' Compensation Leave (WCL)

### Eligibility

Workers' Compensation Leave (WCL) can be selected for any employee in any eligibility group. WCL is not an available take in **Self Service**; only an Administrator can enter WCL for an employee. Beginning balances do not need to be granted prior to using the WCL take.

### Entry

When entering a **WCL** take, the **Comments** field on the **Details** page of the event should be used to record the WC claim number. If a single WCL event is entered for an employee and the hours need to be charged to 2 or more claim numbers, the text entered in the **Comments** field should indicate the number of hours charged to each claim since only one WCL event can be entered per day.

The **WCL** take can be entered with any other take on the same day, in order to substitute scheduled hours not covered by WCL (if WCL coverage is not 100%).

- If the employee does not have sufficient balances of other leave types to cover the difference or chooses not to use paid leave, use the **STL** take (instead of the **LNP** take) to indicate the unpaid time.
- If **CPT** or **OTT** takes are used to substitute hours not covered by WCL, they are entered on the timesheet (top grid) by someone with access to the timesheet. **CPT** and **OTT** are not available on the **Absence Event** page. The entry of **CPT** and **OTT** on the timesheet (top grid) updates the **CPT** and **OTT** balances in Time & Labor.

WCL absence events are not auto-approved by the Administrator. All WCL events must be approved by a second Administrator. To approve a WCL absence event the second Administrator must:

- Search for the employee on **Absence Event** page.
- Click the **Details** tab for the WCL event.
- Checks the **Manager Approved** box.
- Click the **OK** button.
- Click the **Save** button.

The workflow status then changes to **Approved**.

#### Accumulators

The following accumulators track WCL usage and related payee messages that generate as warnings when certain accumulator limits are reached.

- **WCL TAKE BAL DAYS:** Counts consecutive days of WCL (regardless of the number of partial hours entered each day) and includes paid holidays and weekends. The accumulator is used for tracking purposes only and does not have an associated payee message. This accumulator automatically zeroes out at the beginning of the new leave year unless a consecutive FMLA event crosses over into the new leave year. For intermittent FMLA that should continue to accumulate, the Administrator manually adjusts the tracking accumulator as part of the new leave year recertification process.
- **WCL VAC ACR LMT AC:** Counts consecutive days of WCL (regardless of the number of partial hours entered each day) and includes paid holidays and weekends. The accumulator only includes usage of the WCL leave type and not other leave types that may be used as part of the WCL waiting period. This accumulator automatically zeroes out at the beginning of the new leave year unless a consecutive FMLA event crosses over into the new leave year. As part of the new leave year recertification process, the Administrator manually adjusts the tracking accumulator for intermittent FMLA that should continue to accumulate.

To adjust a WCL tracking accumulator, enter a variable override:

- **Element Name** – same name as the accumulator with a **V** in front:
  - **V WCL TAKE BAL DAY**
  - **V WCL VAC ACR LMT**

#### Accruals

The vacation and traditional sick accrual formula does not accrue entitlements in periods where the employee has been on WCL for 90+ consecutive calendar days, as determined by the absence of any regular TRCs in the preceding 90 day period. In order for the employee to continue accruing vacation and traditional sick entitlements within the first 90 days of WCL, use the **STL** take (instead of the **LNP** take) for any leave without pay.

The employee accrues vacation and traditional sick entitlements once they have returned to work for a full pay period. The employee will accrue if they have used any regular hours in the past 90 days.

The VSDP sick and VSDP personal entitlements do not accrue on January 10, at the beginning of the leave year, if the employee has used WCL in the 24<sup>th</sup> pay period of the previous leave year and has not also keyed any regular hours (RGS, RSW, RLW) in that same period.

If an employee returns from WCL leave and did not accrue VSDP sick and VSDP personal on January 10, the Administrator must enter balance adjustments to grant the entitlements upon return.